



**BLOOMINGTON INVESTMENT INCENTIVE FUND  
NON-PROFIT MATCHING GRANT FUND  
APPLICATION CHECKLIST**

1. Section 1.

Organizational Overview

- ☐ Contact information and 501(c)3 letter
- ☐ Staff information
- ☐ Governance Structure
- ☐ Product/service description
- ☐ Audience/market/constituency served
- ☐ Marketing strategy
- ☐ Organizational financial documentation
- ☐ Strategic Plan

Project Overview

- ☐ Project summary
- ☐ Identified need/opportunity
- ☐ Target audience/market/constituency
- ☐ Marketing for project
- ☐ Collaborators
- ☐ Energy/conservation efforts
- ☐ Project viability
- ☐ Budget narrative
- ☐ Impact

2. Section 2. Completed Loan Application

- ☐ General Information
- ☐ Proposal Finances & Readiness
- ☐ Signed Certification
- ☐ Signed Credit Report Authorization and Release

3. Attachment A. Project Readiness Documentation

- ☐ Matching funds secured
- ☐ Land or building purchase documentation
- ☐ Construction contract(s)
- ☐ Equipment/Inventory order information

4. Application Fee

- ☐ \$100.00 application fee payable to the City of Bloomington

5. Please submit above documents to:

City of Bloomington  
Economic & Sustainable Development Department  
P.O. Box 100  
Bloomington, IN 47402

Contact: Miah Michaelson, Assistant Director for the Arts  
Phone: 812-349-3418  
Fax: 812-349-3520  
Email: michaelm@bloomington.in.gov



## **BLOOMINGTON INVESTMENT INCENTIVE FUND NON-PROFIT MATCHING GRANT FUND SECTION 1**

### **Organizational Overview**

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1. Description
  - a. Contact information – Legal name and full contact information for organization including FEIN. Attach copy of IRS 501(c) 3 determination letter.
  - b. Staff – Contact information and brief bios on relevant organizational staff; contact information and bios of all project management staff.
  - c. Governance Structure – 1-2 page narrative on organizational structure and function including list of all board members with affiliations. Include information on the frequency of meetings and summary of basic board functions (including financial functions).
  - d. Product, Service, or Outcome – 1-2 page description of product or service produced or outcomes sought.
  - e. Audience/Market/Constituency Served – 1-2 page narrative on audience for whom product/service/outcome is produced. Assess and differentiate organization from other similar providers in the marketplace. Include findings of previous or current market/audience/constituency analysis.
  - f. Marketing – Provide overview of organizational marketing strategy.
2. Financial – Current fiscal year budget and three (3) years previous of either audit or balance sheet and profit/loss statement.
3. Strategic Plan and mission statement – 1-2 page overview of organization's current strategic plan, mission, and outline other organizational planning efforts that may be in progress.

### **Project Overview**

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1. Description and Rationale
  - a. Project Narrative – A description of project to include the following:
    - i. Project Summary – 1-2 page narrative including development history, key staff, project specifics, role of project in strategic plan and timeline for implementation.
    - ii. Identified Need/Opportunity – What is the identified need, how does the project meet that need and how does the project align with current organizational and/or community planning.
    - iii. Target Audience/Market/Constituency – Identify and quantify the project audience including any increases in quantity or efficiency.
    - iv. Marketing – Outline marketing efforts for project, including timeline.
    - v. Collaborators – Describe any key collaborators on project.
    - vi. Energy/Conservation Efforts – Describe any energy or conservation efforts that reflected in your project as well as your organization.
  - b. Viability of project – Describe plans to ensure project's ongoing viability beyond the timeline of the current grant.
2. Financial
  - a. Budget narrative – Provide a narrative explanation for all items on project budget in Part 2 of the application. Indicate where costs are estimated and by what methodology. Indicate sources for all anticipated revenue
  - b. Impact – Describe the project's impact on the organization's financial health and growth.



**BLOOMINGTON INVESTMENT INCENTIVE FUND  
NON-PROFIT MATCHING GRANT FUND  
SECTION 2: Application – Part 1  
GENERAL INFORMATION**

Rev. 2010

Please attach additional sheets if necessary.

Date of application:	
Applicant name(s):	
Applicant phone:	
Applicant address:	
Applicant email:	

If the applicant and or not-for-profit enterprise are not one and the same, please provide not-for-profit contact information.

Not-for-profit name:	
Phone:	
Address:	
Email:	

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Total amount requested:

Total project cost:

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Grant Eligibility:      Please check one.

<input type="checkbox"/>	Organization with a retail or commercial activity as a primary purpose.
<input type="checkbox"/>	Organization that operates a social enterprise, in which at least one social or environmental goal is considered to be of equal importance to traditional commercial or other business goals.

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Start-up date:	
Type of incorporation:	
Incorporation date:	State:
Federal Tax ID #:	NAICS code:

List the hours of operation for the organization.

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday

List the days and hours each principal owner will be at the business.

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday

1. Please list any insurance policies related to the organization currently in place (i.e. health plans, liability coverage, etc.)



**BLOOMINGTON INVESTMENT INCENTIVE FUND  
NON-PROFIT MATCHING GRANT FUND  
SECTION 2: Application – Part 2  
PROPOSAL FINANCES & READINESS**

**Project Budget:**

Description	BIIF Request	Other Source	Other Source	Total Line Item Cost
	\$	\$ Define source:	\$ Define source:	\$
	\$	\$ Define source:	\$ Define source:	\$
	\$	\$ Define source:	\$ Define source:	\$
	\$	\$ Define source:	\$ Define source:	\$
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	\$	\$ Define source:	\$ Define source:	\$
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	\$	\$ Define source:	\$ Define source:	\$
	\$	\$ Define source:	\$ Define source:	\$
	\$	\$ Define source:	\$ Define source:	\$
<b>TOTAL GRANT REQUEST</b> <i>Must not exceed 50% of total project cost. Total Request must not exceed \$25,000.</i>	\$			<b>TOTAL PROJECT COST:</b> \$

**Project Readiness**

*Please answer questions below if applicable to your business and provide documentation as necessary in Attachment A.*

For those sources of matching funds that are not already secured, please explain where your organization is at in the process.

Has the land or building for this project been purchased or has an offer been made?

Yes ☐ No ☐ If so, when:

Provide further explanation if necessary.

Have construction contracts for this project been signed?

Yes ☐ No ☐ If so, when:

Provide further explanation if necessary.

Has equipment or inventory to be financed been ordered?

Yes ☐ No ☐ If so, when:

Provide further explanation if necessary.

**Professional Support Personnel**

*(i.e. attorney, accountant, bank representative, etc.)*

Name:	Address:	Phone:	Occupation:
Name:	Address:	Phone:	Occupation:
Name:	Address:	Phone:	Occupation:
Name:	Address:	Phone:	Occupation:
Name:	Address:	Phone:	Occupation:



**BLOOMINGTON INVESTMENT INCENTIVE FUND  
NON-PROFIT MATCHING GRANT FUND  
CERTIFICATION**

The loan applicant herein certified that:

- To the best of the applicant's knowledge and belief, the data presented in this loan application is true and correct, and is provided for the purpose of obtaining or maintaining credit.
- The purpose described in this application has been duly and legally authorized by the applicant.
- Upon approval of the funds requested, the applicant is willing and is duly and legally authorized to enter into a legally binding loan commitment and will comply with all of the provisions and conditions of any loan agreement.
- The applicant hereby authorizes the Loan Review Committee, its authorized agent and representatives, to investigate the applicant's credit worthiness, credit capacity, or business affairs.
- The applicant hereby authorizes any person, business, and/or financial institution having information pertaining to the applicant's credit worthiness credit capacity, or business affairs to release the same to the Loan Review Committee, its authorized agents or representatives.
- The applicant agrees to hold harmless the City of Bloomington, its officers, agents, and the City of Bloomington Loan Review Committee members and their respective organizations from liability as a result of actions and outcomes taken during or after the loan review process.
- I further certify that the individual(s) applying for the Business Investment Incentive Loan Fund are not in arrears on any payments, fees, charges, fines or penalties owed to the City of Bloomington, Indiana, including, but not limited to, City of Bloomington Utilities, Bloomington Transit, and any other City of Bloomington departments, boards or commissions.

**Applicant**

**Co-applicant**

Organization name:

Organization name:

\_\_\_\_\_  
By (Applicant's signature)

\_\_\_\_\_  
By (Co-applicant's signature)

Printed name:

Printed name:

Title:

Title:

Date:

Date:

**Please return this completed application along with \$100.00 processing fee and appropriate attachments to:**

City of Bloomington  
Department of Economic & Sustainable Development  
PO Box 100  
Bloomington, IN 47402

## CREDIT REPORT AUTHORIZATION AND RELEASE

Authorization is hereby granted to the City of Bloomington to obtain a standard factual data credit report through a credit reporting agency chosen by the City of Bloomington.

My signature below authorizes the release to the credit-reporting agency a copy of my credit application and authorizes the credit-reporting agency to obtain information regarding my employment, savings accounts, and outstanding credit accounts (mortgage, auto loans, personal loans, charge cards, credit unions, etc.) Authorization is further granted to the reporting agency to use a photo static reproduction of this authorization if necessary to obtain any information regarding the above-mentioned information.

Any reproduction of this credit report authorized and release made by reliable means (for example, photocopy or facsimile) is considered an original.

1. \_\_\_\_\_  
Borrower's signature  
Date: \_\_\_\_\_ Social Security Number: \_\_\_\_\_
  
2. \_\_\_\_\_  
Borrower's signature  
Date: \_\_\_\_\_ Social Security Number: \_\_\_\_\_